



**ROAD PAVEMENTS
FORUM**

SANRAL LATEST DEVELOPMENTS



SANRAL OVERVIEW

9 April 2025



EASTERN CAPE, N2 WILD COAST, MSIKABA BRIDGE

PRINCIPAL TASKS

PLAN

Plan, design, construct, operate, maintain and rehabilitate South Africa's national roads.

GENERATE

Generate revenue from the development and management of assets.

UNDERTAKE

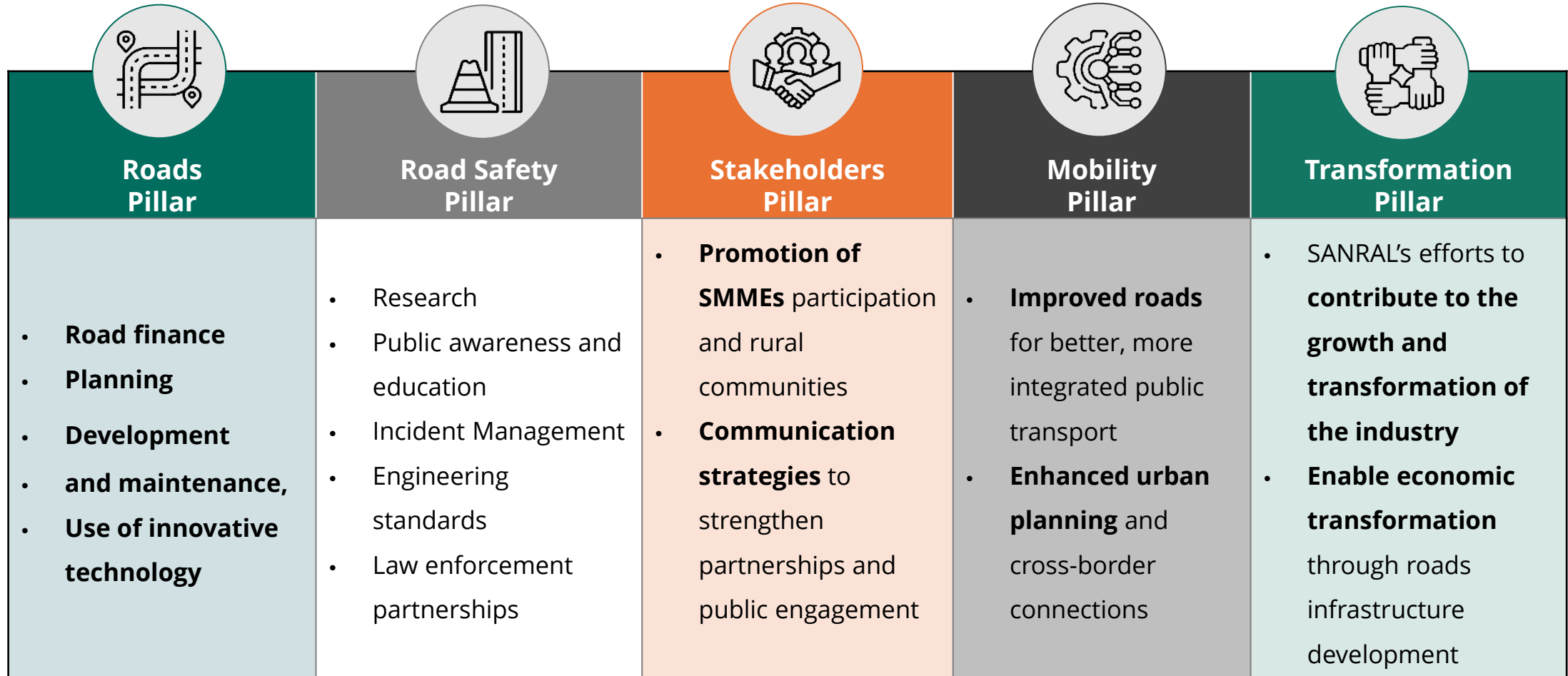
Undertake research and development to advance knowledge in the design and construction of roads and related fields.

ADVISE

Advise the Minister of Transport on matters relating to South Africa's roads.

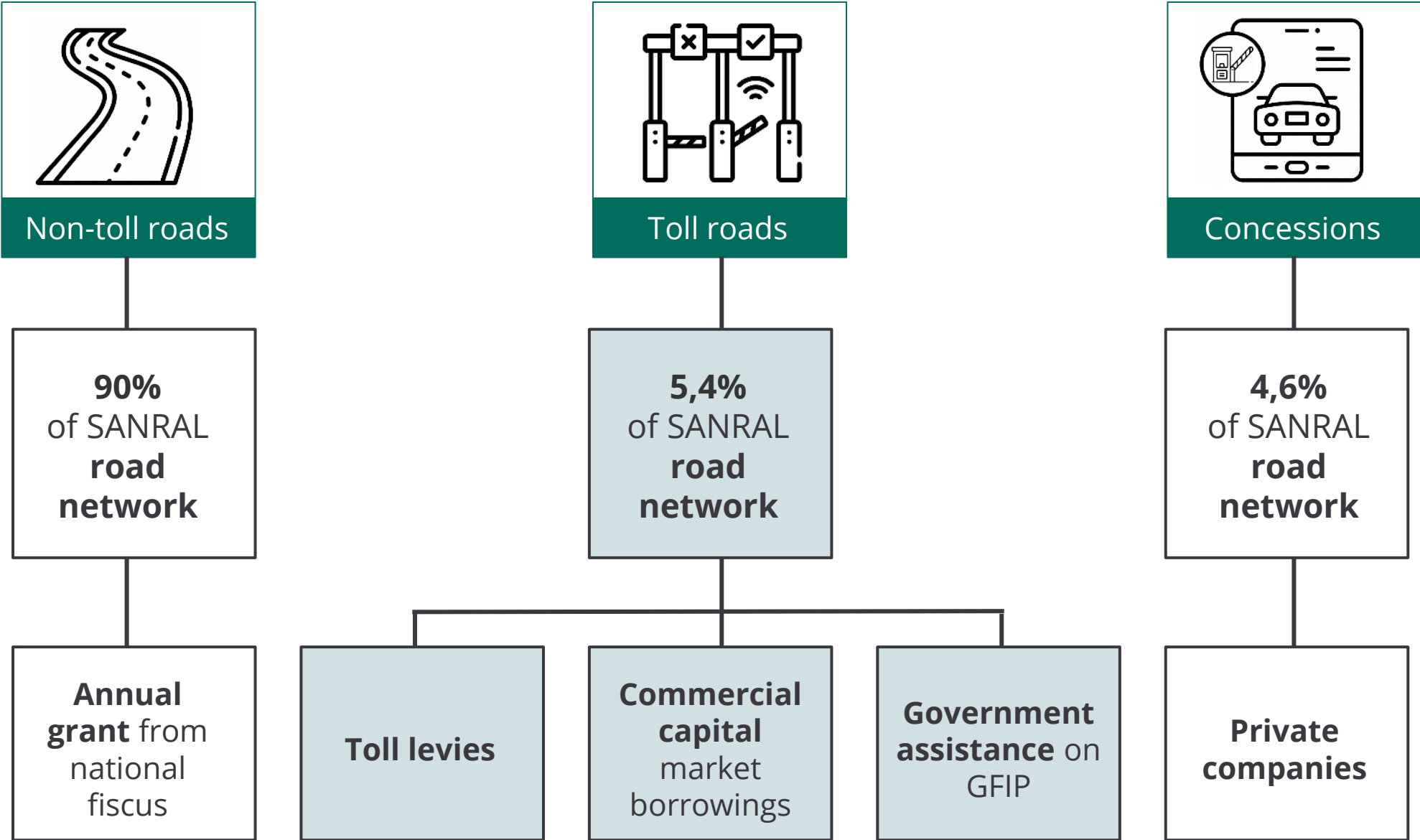


BUSINESS PILLARS



SANRAL's long-term strategy, **Horizon 2030**, defines five business pillars that serve to integrate its operations and activities across the Agency and deliver different forms of value.

FUNDING SOURCES



SANRAL ALIGNMENT WITH GNU STRATEGIC OBJECTIVES



1

TO DRIVE INCLUSIVE GROWTH AND JOB CREATION BY:



- Driving investment and boosting key economic sectors
- Investing in national infrastructure, using public private partnerships to strengthen energy, communication, water and transport infrastructure
- Boosting small business growth and empowering entrepreneurs and co-operatives especially in townships and villages
- Expanding special employment initiatives like the Presidential Employment Stimulus
- Building a competitive economy
- Sustaining and powering a nation
- Transitioning to a low-carbon economy
- Investing in research and innovation
- Strengthening our economic foundation for global partnerships

KEY ACTIONS

- Boost key job-creating sectors
- Secure massive infrastructure investment
- Support small businesses and entrepreneurs
- Ensure economic reforms for competitiveness
- Invest in technology, agriculture and mining
- Expand research and development

2

TO REDUCE POVERTY AND TACKLE THE HIGH COST OF LIVING BY:

- Driving investment and boosting key economic o Supporting basic needs
- Cost of living reduction
- Income support and social protection
- Asset poverty reduction
- Investing in education and skills development
- Transforming healthcare



KEY ACTIONS

- Provide affordable basic services and essential foods
- Support the unemployed and vulnerable
- Improve housing and transportation
- Provide quality education from early childhood
- Ensure schools are well-resourced with necessary facilities
- Expand vocational training
- Provide accessible health care for everyone

3

TO BUILD A CAPABLE, ETHICAL AND DEVELOPMENTAL STATE BY:

- Stabilising local government service
- Strengthening government
- Improving water services
- Professionalising municipal management
- Creating a professional public t effectiveness
- Ramping up digital transformation
- Enforcing anti-corruption measures
- Enhancing public safety
- Combatting cross-border crime



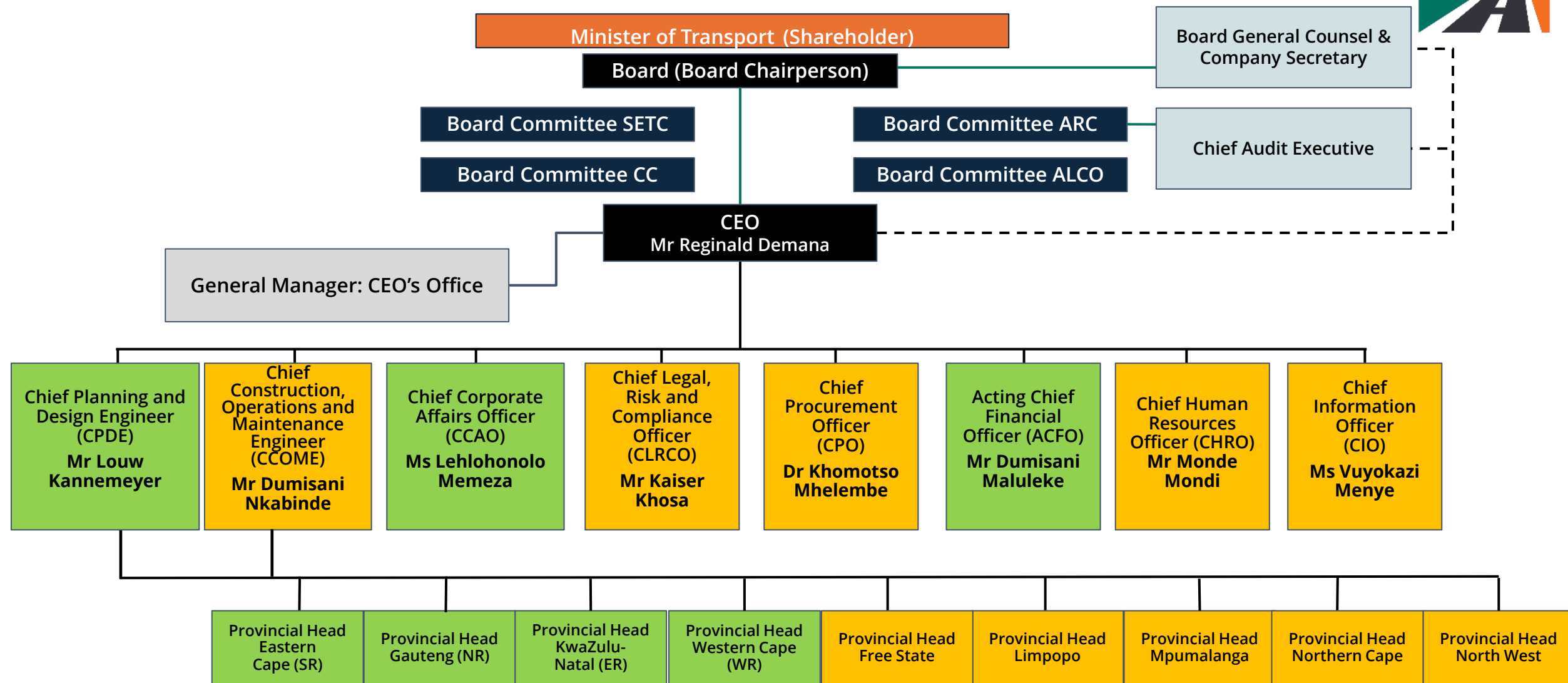
KEY ACTIONS

- Improve local government and basic services
- Enable a professional and capable public service
- Take a tougher stance on crime and corruption
- Enhance community safety



SANRAL CORPORATE STRUCTURE

SANRAL CORPORATE STRUCTURE



Transitioning from 4 x Regional Offices to 9 x Provincial Offices from 1 April 2025

New SANRAL Provincial Offices – Initial focus RRM, Statutory Control, Stakeholder Engagement, Procurement Admin



SANRAL ROAD NETWORK

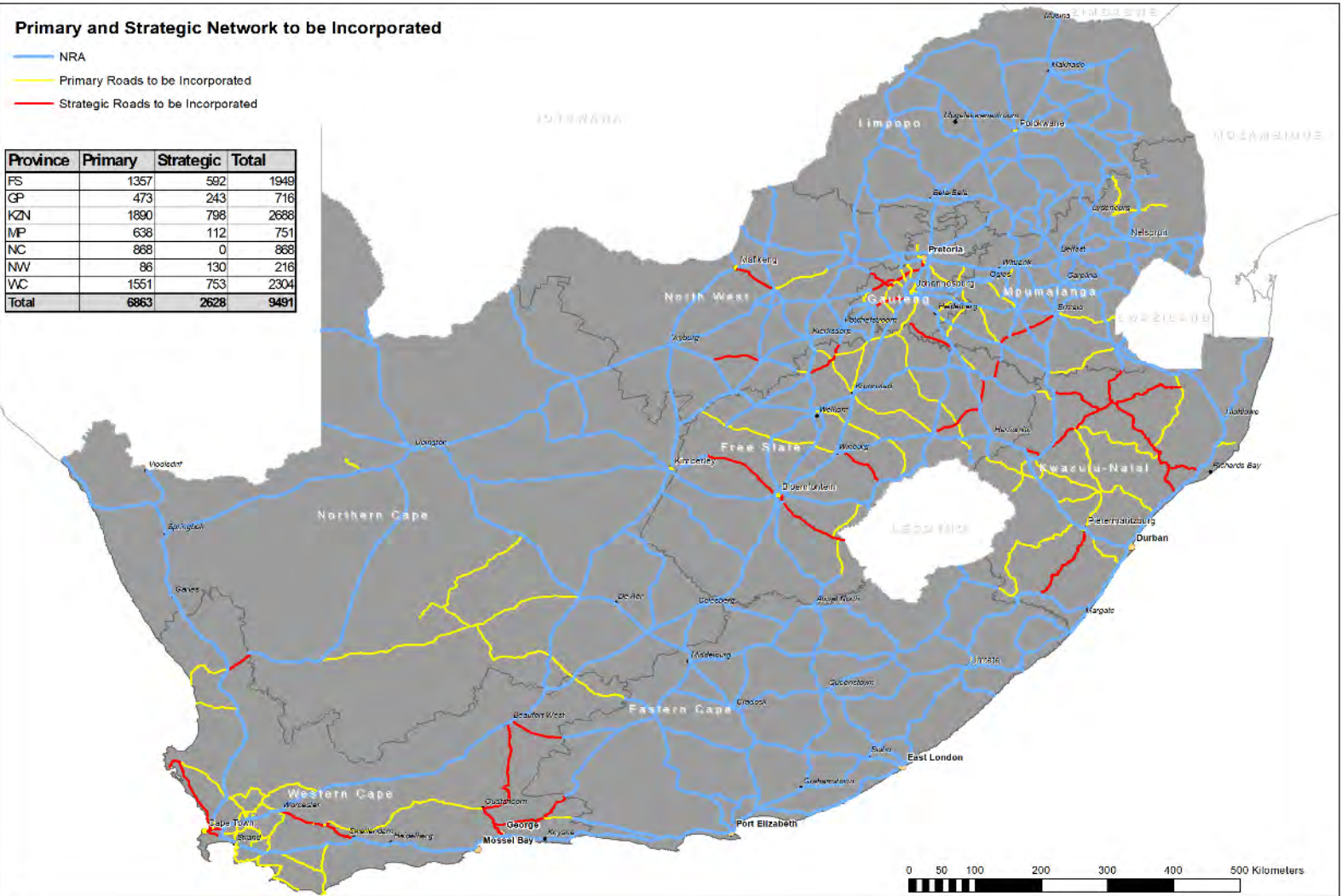
10 STRATEGIC AND PRIMARY NETWORK TRANSFERS (± 35 000 km)



Primary and Strategic Network to be Incorporated

- NRA
- Primary Roads to be Incorporated
- Strategic Roads to be Incorporated

Province	Primary	Strategic	Total
FS	1357	592	1949
GP	473	243	716
KZN	1890	798	2688
MP	638	112	751
NC	868	0	868
NW	86	130	216
WC	1551	753	2304
Total	6863	2628	9491



Transfer requests are considered based on the Road Classification System from Road Infrastructure Strategic Framework for South Africa (RISFSA)/COTO TRH26, for transfer to SANRAL must have R1 or R2 classification

Province	Length Requested (km)	Length Meeting Criteria (km)
Eastern Cape	1,649	586 (26/02)
Free State	928	659 (22/11)
Limpopo	1,012	753 (22/11)
Mpumalanga	1,041	940 (22/11)
Northern Cape	61	61 (18/10)
North West	367	367 (26/02)
Total	5,058	3,366

- In 2022/23 SANRAL transferred 330km in August 2022 from Eastern Cape, 953km in November 2022 from Northern Cape and 12km from North West in March 2023.
- In 2023/24 SANRAL transferred 600km from Free State another 219km in March 2024.
- In 2024/25 SANRAL transferred 61 km in October 2024 from Northern Cape, in November 2024 659km from Free State, 753 km from Limpopo and 940 km from Mpumalanga. In February 2025 586 km from Eastern Cape and 367 km from North West.

SANRAL ROAD NETWORK - BREAKDOWN BY PROVINCE

Province	Paved (km)	Gravel (km)	Total (km)
EC	5,483	402	5,885
FS	3,051	7	3,058
GP	854	0	854
KZN	1,321	0	1,321
LP	4,394	0	4,394
MP	3,410	0	3,410
NC	4,359	113	4,472
NW	2,642	0	2,642
WC	1,465	0	1,465
Total	26,979	522	27,501



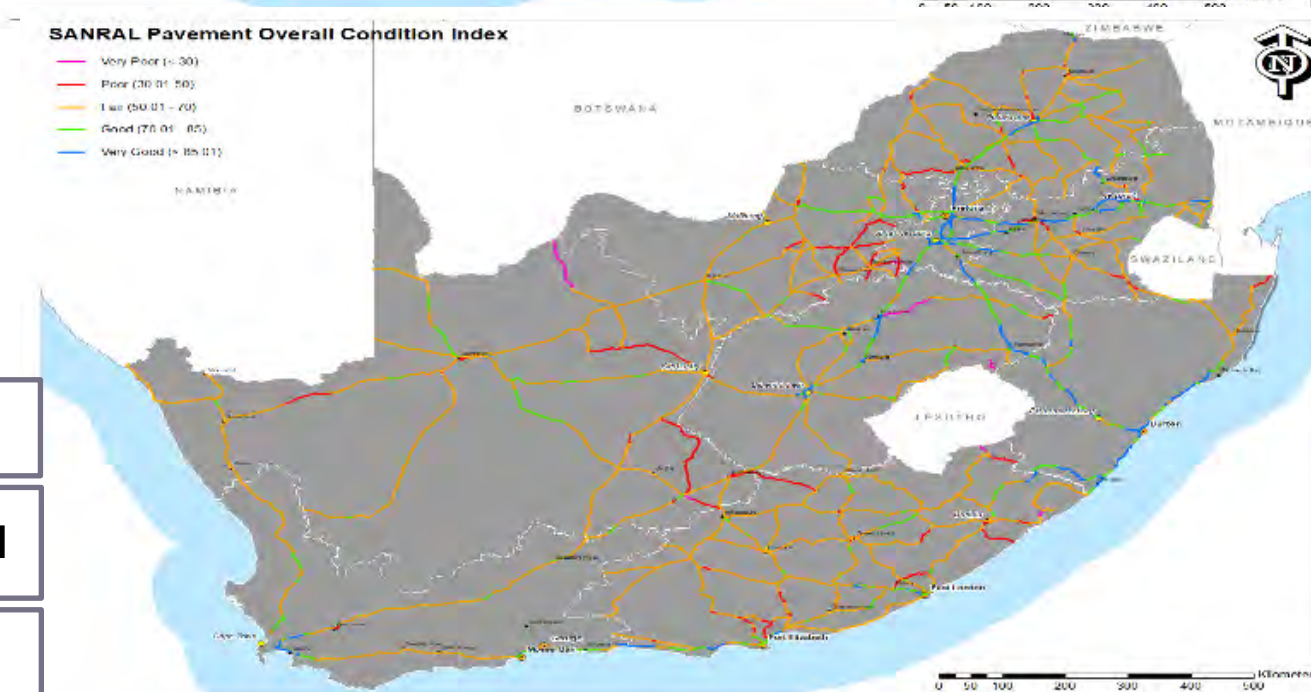
SANRAL 27,501 km network
4,4% of South Africa's total road network



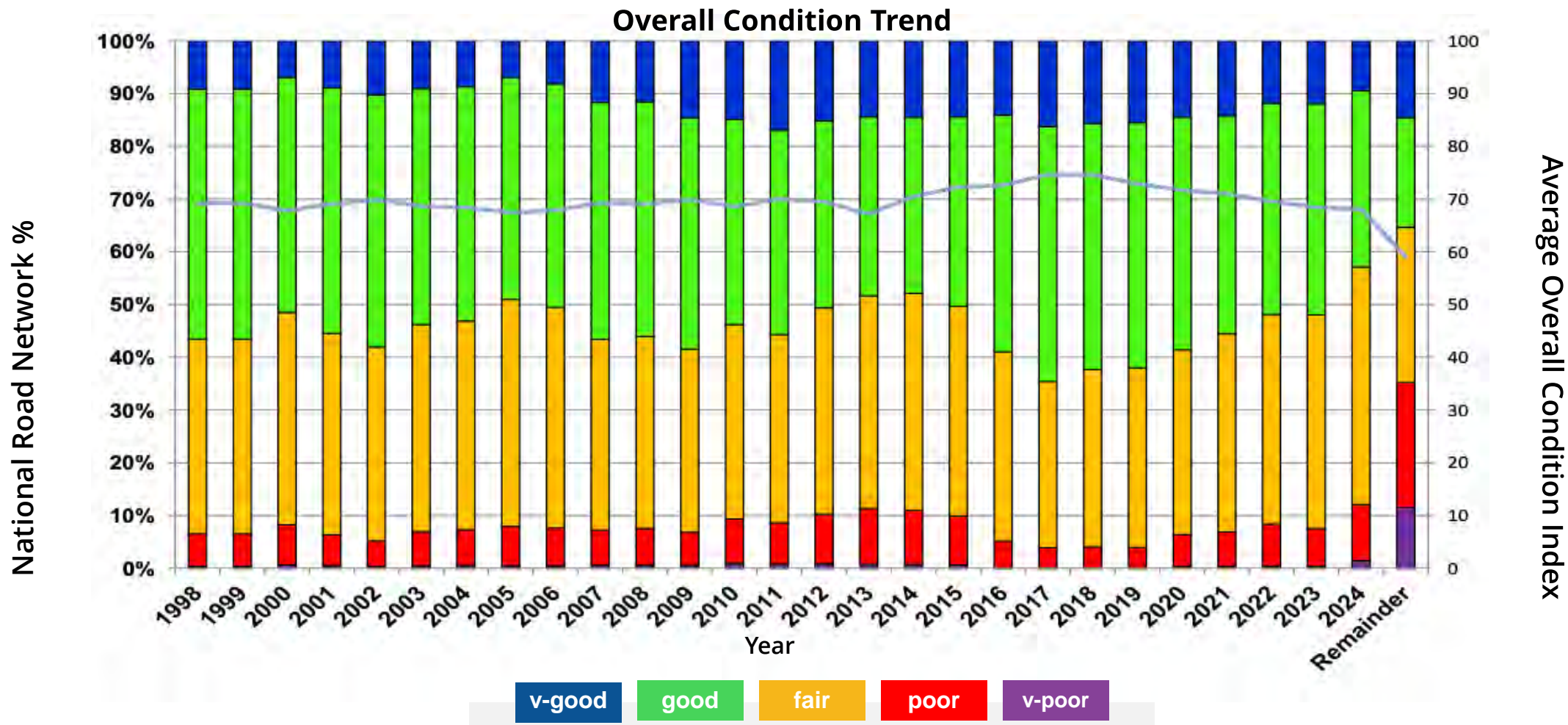
Carries **34%** of all annual vehicle km travelled



Carries more than **70%** of all long-distance freight



SANRAL ROAD CONDITION TREND - 2024

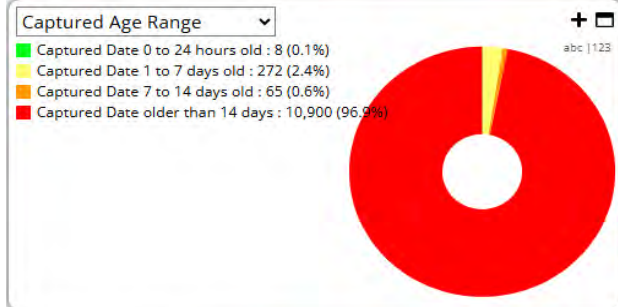


- Currently 3,250km or 12,1% of SANRAL roads are in poor to very poor surface condition. The international norm for a well-maintained network is 10%. The main contributing reason for this increase is the provincial roads transferred to SANRAL in the past three financial years. The average OCI of 68.1 is just below the international norm of 70.
- The condition of the remainder of strategic and primary roads under provincial administration still to be transferred is substantially worse (36.2% poor to very poor).

VALA ZONKE POTHOLES



Displaying 11,245 of 114,571 Vala Zonke Pothole Locations



Dropdown Lists Authority (Linked) Road ID

Project Code

NRA - SANRAL Apply

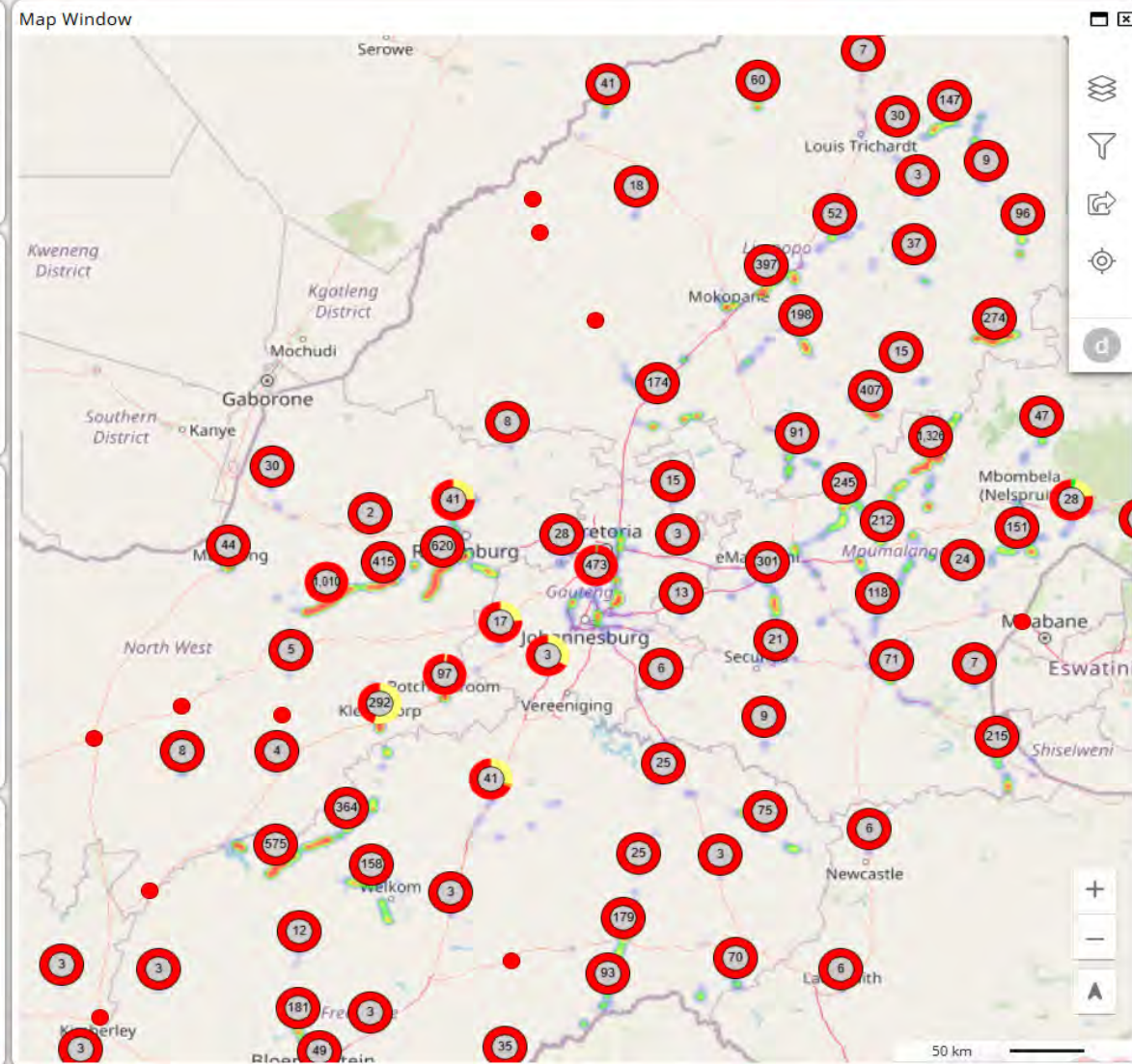
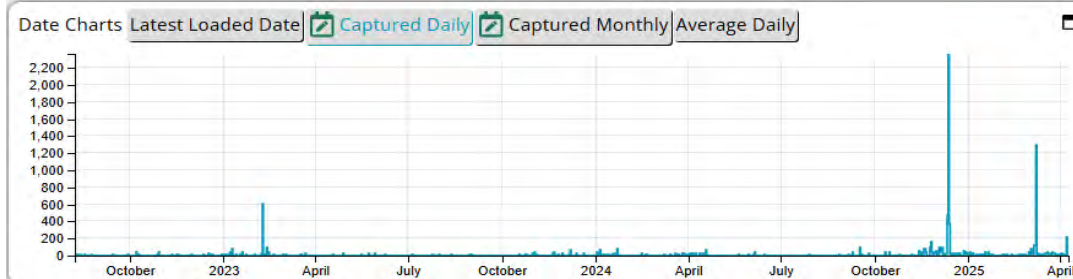
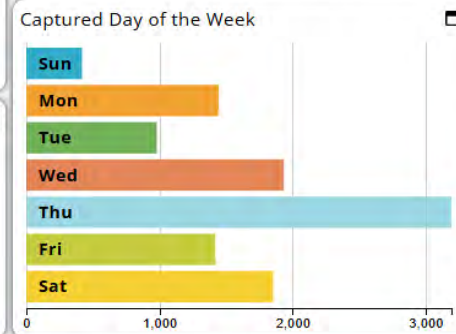
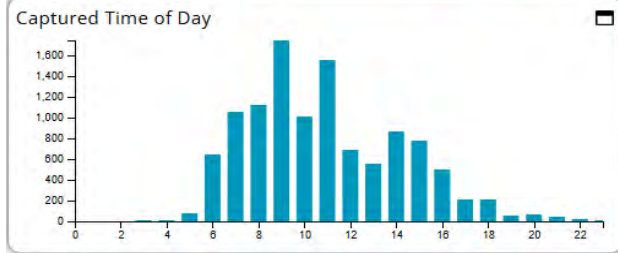
Filter	Count	
NRA - SANRAL	11245	Remove

MDB Dropdown Lists Province Code

District Municipality Local Municipality

WCP Apply

Filter	Count	
ECP	484	Remove
FSP	2351	Remove
GTP	510	Remove



Province	Potholes
ECP	484
FSP	2351
GTP	510
KZN	283
LPP	2123
MPP	2762
NCP	146
NWP	2569
WCP	17
Total	11245

SANRAL ACTION STEPS ON ROAD TRANSFERS

Step 1: Immediately upon gazette as national road, SANRAL activates urgent Routine Road Maintenance actions on the routes to address routine maintenance backlogs, i.e. patching potholes, clearing drains, guardrail repairs, road sign repairs, cutting grass and collecting litter.

Budget for this is obtained by reprioritising existing SANRAL non-toll budget allocations.

Step 2: Once urgent Routine Road Maintenance backlogs have been addressed, SANRAL performs network condition assessments of the transferred roads and bridges and do traffic counts on the corridors.

Step 3: From the condition and traffic surveys we then formulate the SANRAL preventative (periodic) maintenance strategies (OPEX) for the transferred roads, with immediate focus on reseals where applicable over the 3-year MTEF budget cycle.

Budget for this is reprioritised from existing SANRAL non-toll budget allocations.

Step 4: From the condition and traffic surveys, formulate the SANRAL strengthening and improvement strategies (CAPEX) for the transferred roads, based on available SANRAL non-toll budgets.

Step 5: As part of the annual MTEF budget process, SANRAL then makes submissions to National Treasury for additional budget allocations based on the condition assessment.



SANRAL ROAD WORKS CLASSIFICATION AND BUDGET ALLOCATION PRIORITY



1. Routine operations (OPEX): Includes **day-to-day routine activities** such as cleaning drains & culverts, vegetation control, line marking, guardrail repair, road sign repair, crack sealing, patching, edge repair, shoulder spot regravelling, shoulder blading. Includes costs associated with operation of Toll Plazas, Weighbridges, Freeway Management.



2. Periodic maintenance (OPEX): Includes **periodically scheduled activities** such as fog sprays/diluted emulsions/rejuvenators, repair of isolated areas, surface seals and functional asphalt overlays < 50mm in thickness.



3. Special maintenance (OPEX): Repair of selected larger areas followed by surface seals and functional asphalt overlays < 50mm in thickness.



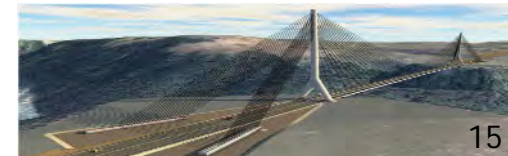
4. Strengthening (CAPEX): Includes **increasing the structural capacity of an existing pavement** through recycling existing layers and/or adding new granular layers or structural asphalt overlays >80mm thick.



5. Improvements (CAPEX): Works that aim **to improve service quality on roads** with unacceptable quality. These include measures such as i.e. addition of climbing/passing lanes, addition of paved shoulder and localised geometric and intersection improvements.



6. New facilities (CAPEX): Works that aim **to improve network capacity**; includes upgrading single carriageways to 4-lane or dual carriageway road, construction of new roads (brown/green fields construction), and construction of new bridges or new interchanges to replace intersections.



16 SANRAL 3-YEAR PROJECT PIPELINE



Project Type	Non-Toll		Toll		Total	
	Design	Construction	Design	Construction	Design	Construction
Routine Maintenance	189	125	69	76	258	201
Periodic Maintenance	181	78	31	16	212	94
Special Maintenance	130	49	22	6	152	55
Community Projects	134	35	14	0	148	35
Strengthening	34	15	7	3	41	18
Improvements	140	52	16	2	156	54
New Facilities	185	48	40	6	225	54
Total Projects	993	402	199	109	1192	511
	1395		308		1703	
Total Project Value (R'million)	R132 000		R49 000		R181 000	

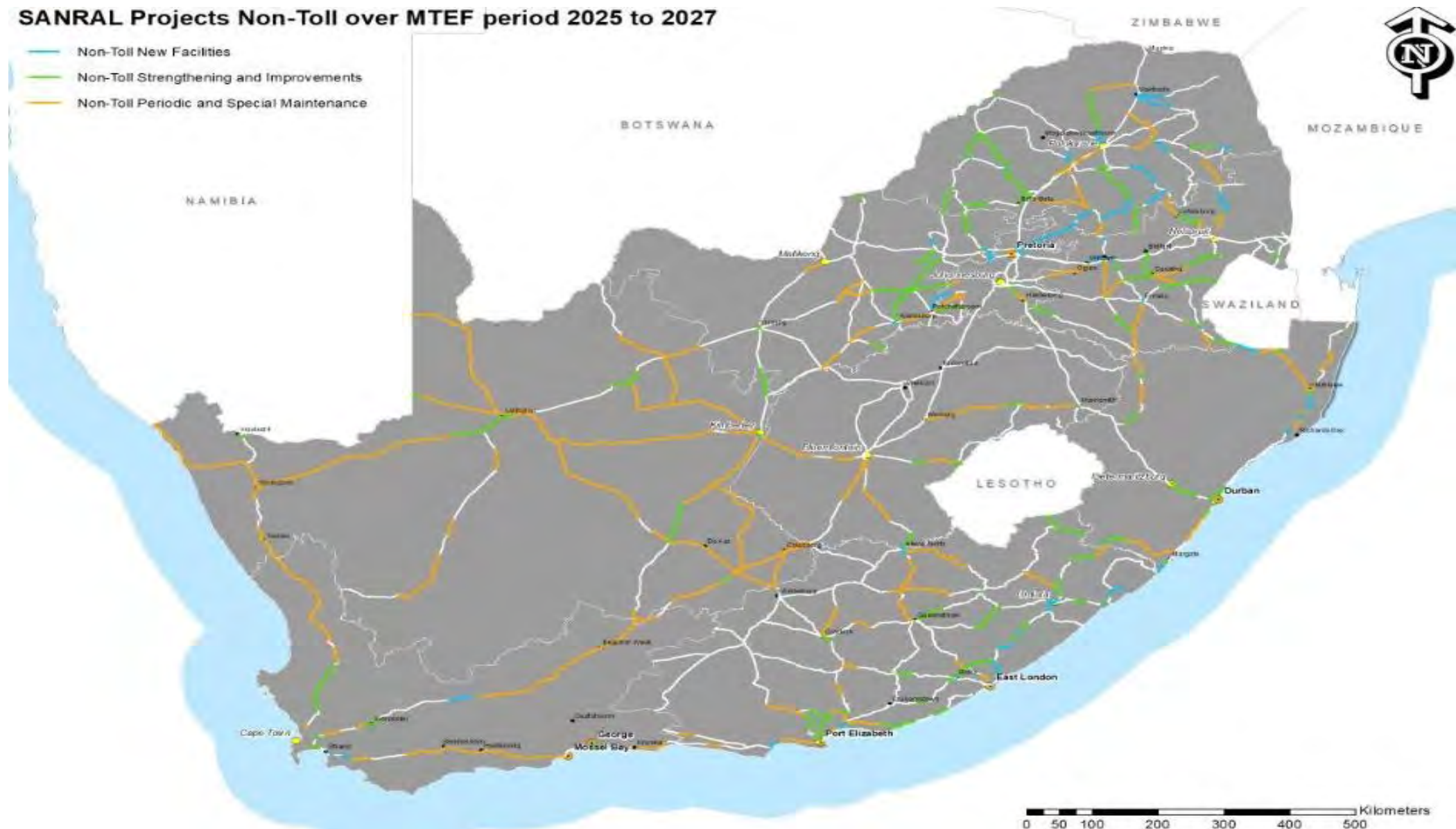
- Non Toll Budget – R106,8 bn National Treasury allocation - R93,8 bn for non toll, remaining R13,8 bn relates to GFIP debt repayment.
- Toll Budget – New borrowing limit of R16.5 bn up to 2028.

SANRAL 3-YEAR PROJECT PIPELINE – NON-TOLL



SANRAL Projects Non-Toll over MTEF period 2025 to 2027

- Non-Toll New Facilities
- Non-Toll Strengthening and Improvements
- Non-Toll Periodic and Special Maintenance



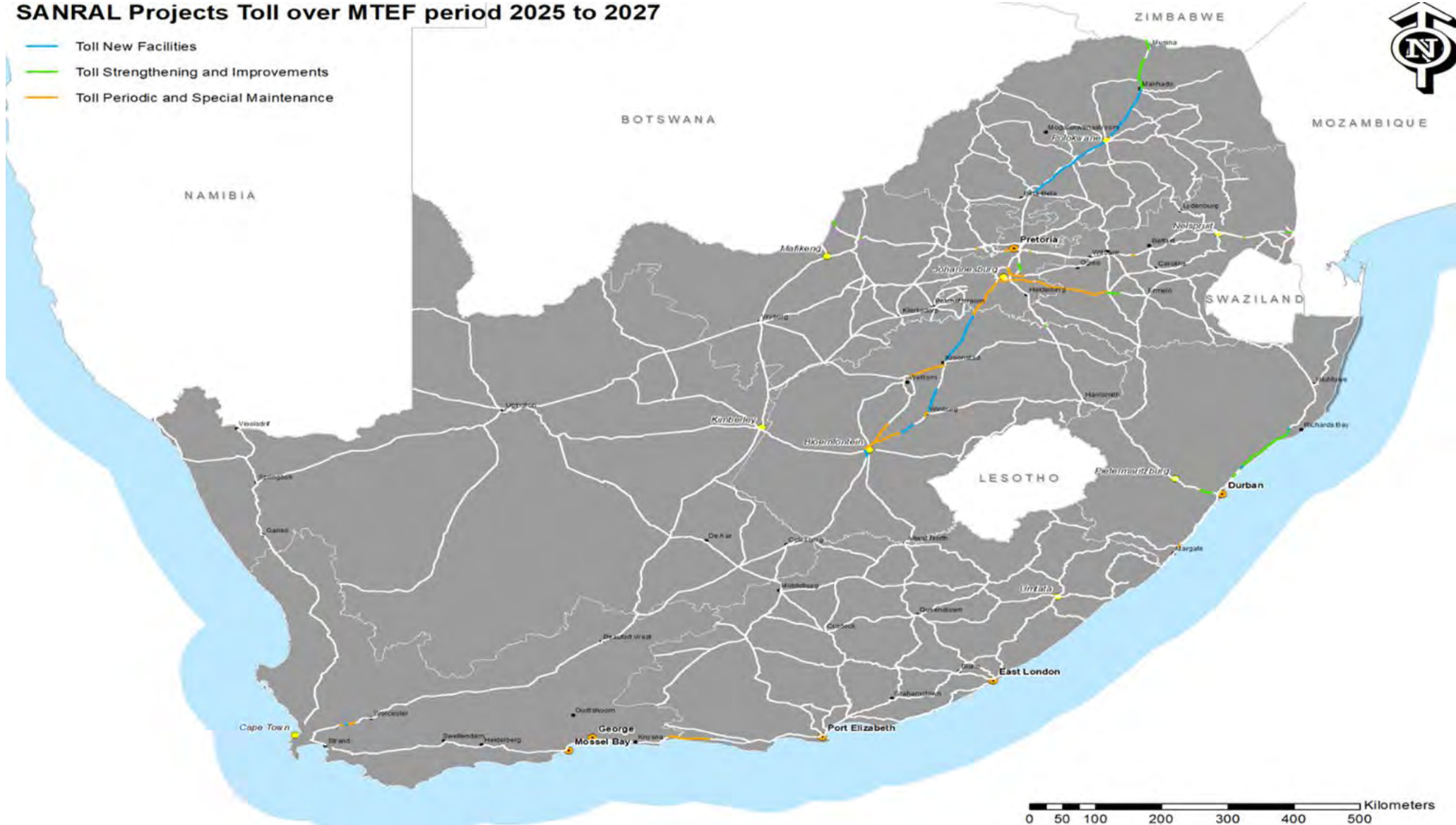
0 50 100 200 300 400 500 Kilometers



SANRAL 3-YEAR PROJECT PIPELINE – TOLL

SANRAL Projects Toll over MTEF period 2025 to 2027

- Toll New Facilities
- Toll Strengthening and Improvements
- Toll Periodic and Special Maintenance



0 50 100 200 300 400 500 Kilometers

SANRAL FLAGSHIP PROJECTS

N2-N3 UPGRADE



The expansion of the N2 and N3 - KwaZulu-Natal:

- 135km of upgrades
- 25 work packages
- 8 work packages in construction
- **Estimate R40 billion**
- **Estimated 17,000 FTE jobs**

MOLOTO ROAD



The Moloto Road (R573) Gauteng, Mpumalanga & Limpopo:

- 139km of road improvements
- 17 work packages
- 4 work packages in construction
- **Estimate R11.5 billion**
- **Estimated 6,250 FTE jobs**

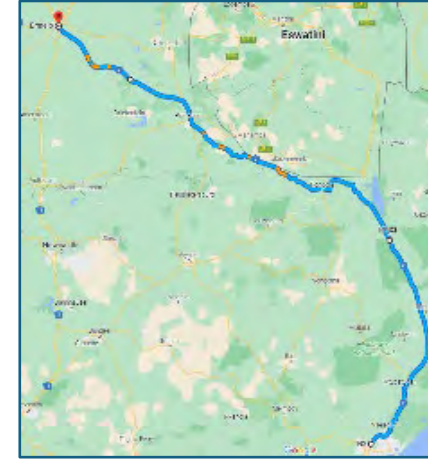
N2 WILD COAST



The N2 Wild Coast Road in the Eastern Cape:

- 112km of new greenfield road
- 9 work packages
- 3 work packages in construction
- **Estimate R23.5 billion**
- **Estimated 8,000 FTE jobs**

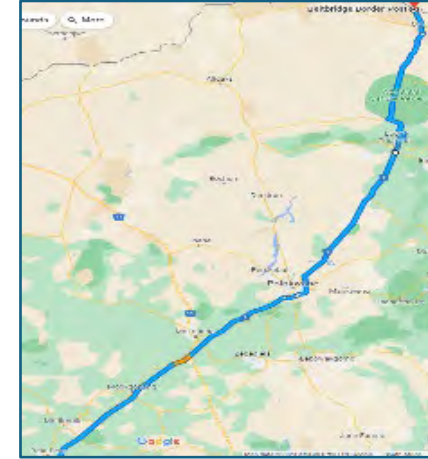
N2 ERMELO TO RICHARDS BAY



The N2 Richards Bay to Ermelo in KwaZulu Natal and Mpumalanga:

- 415km of upgrades
- 19 work packages
- 2 work packages in construction tender
- **Estimate R48 billion**
- **Estimated 19,500 FTE jobs**

N1 BELLA BELLA TO BEIT BRIDGE



The N1 Bella Bella to Beitbridge Limpopo:

- 380km of upgrades
- 9 work packages
- 1 work package in construction tender
- **Estimate R10.8 billion**
- **Estimated 6,000 FTE jobs**

FLAGSHIP PROJECT: HUGUENOT TUNNEL

- **Upgrade of N1 Huguenot Tunnel:** Commissioning of North Bore and combining South Bore, to meet International Safety Standards
- The South Bore of the Huguenot Tunnel opened in **March 1988** and has been in operation ever since (36 years)
- **More than 112 million** vehicles have passed through the tunnel to date
- The **North Bore was also excavated**, but was not fully commissioned at the time, lacking operational portals and approaches, road, ventilation and lighting
- The tender closes in June 2025 for the North Bore



ROAD TRANSPORT RELATED BUDGETS

Road Transport Related Budgets			
Description	Financial Year		
	2025/26	2026/27	2027/28
Income	R 91 300	R 95 871	R 100 692
Fuel Levy (Estimates)*	R 83 100	R 87 671	R 92 492
Vehicle Licence Fees (Estimates)**	R 8 200	R 8 200	R 8 200
Direct Allocations***	R 112 310	R 114 879	R 116 774
<i>National - SANRAL Non Toll</i>	<i>R 30 861</i>	<i>R 31 341</i>	<i>R 31 640</i>
<i>Provincial - Road Maintenance Grant</i>	<i>R 17 851</i>	<i>R 17 247</i>	<i>R 18 028</i>
Provincial - Public Transport Operations Grant	R 8 081	R 8 452	R 8 834
<i>Provincial - EPWP Integrated Grant for Provinces</i>	<i>R 627</i>	<i>R 656</i>	<i>R 686</i>
Local - General fuel levy sharing with metros	R 16 849	R 17 621	R 18 418
Local - Municipal Infrastructure Grant (15.7% Roads)	R 2 725	R 3 040	R 3 177
Local - Public transport infrastructure grant	R 7 241	R 8 044	R 7 098
Local - Public Transport Network Operations Grant	R 8 081	R 8 452	R 8 834
Local - Rural roads asset management systems grant	R 126	R 132	R 138
Local - EPWP Integrated Grant for Municipalities	R 567	R 593	R 620
Provincial Roads - Equitable Share Allocation	R 19 301	R 19 301	R 19 301
Surplus/Shortfall	R -21 010	R -19 008	R -16 082

Notes:

* Current Fuel Levy R3.15/l for petrol (77.5% of vehicles) and R3.00/l for diesel (22.5% of vehicles)

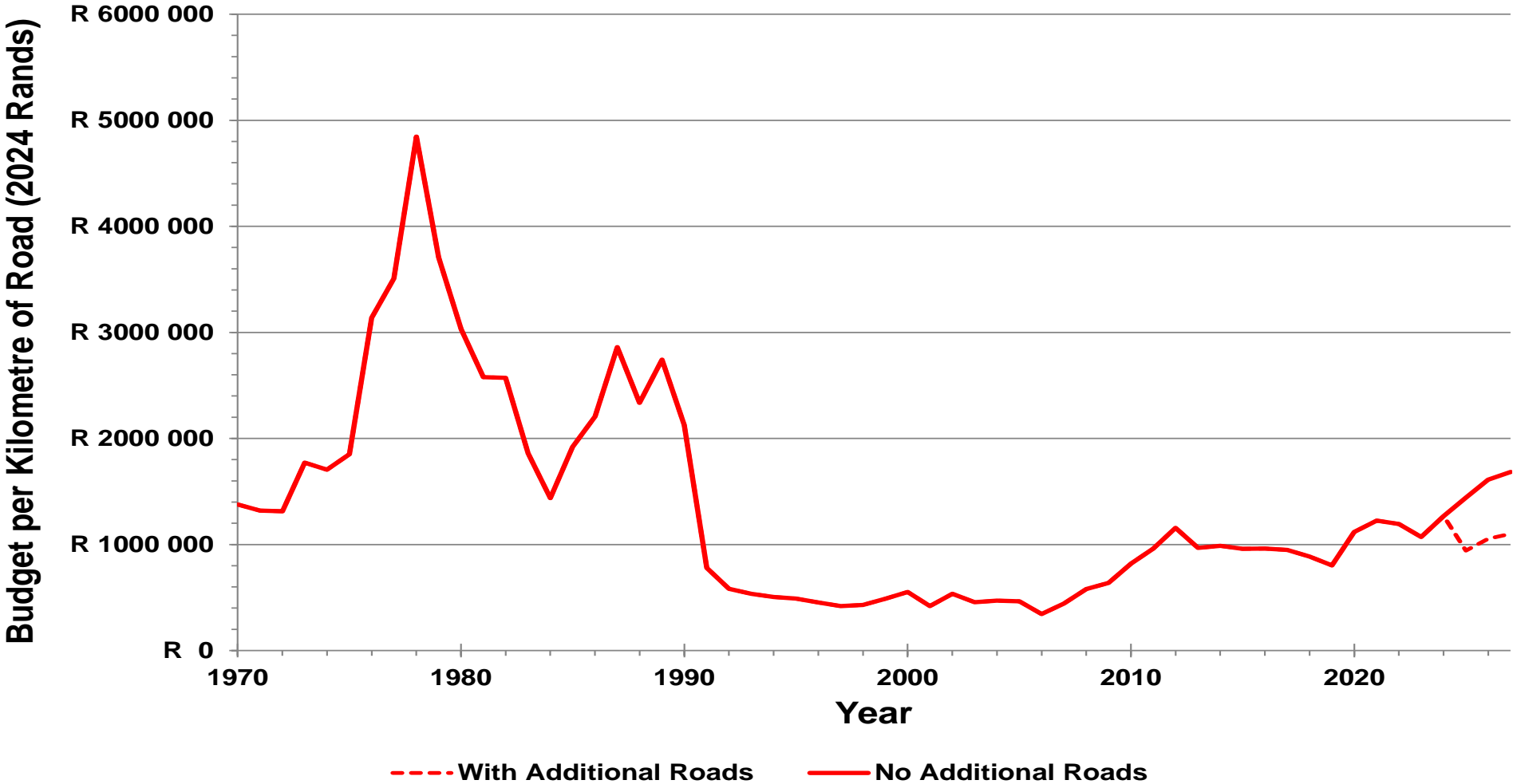
** Income not ringfenced for roads only.

*** Excludes indirect allocations made by authorities raised through rates and taxes at municipal level.

SANRAL FUNDING – FISCUS NON TOLL



Budget per Road Kilometre Trend



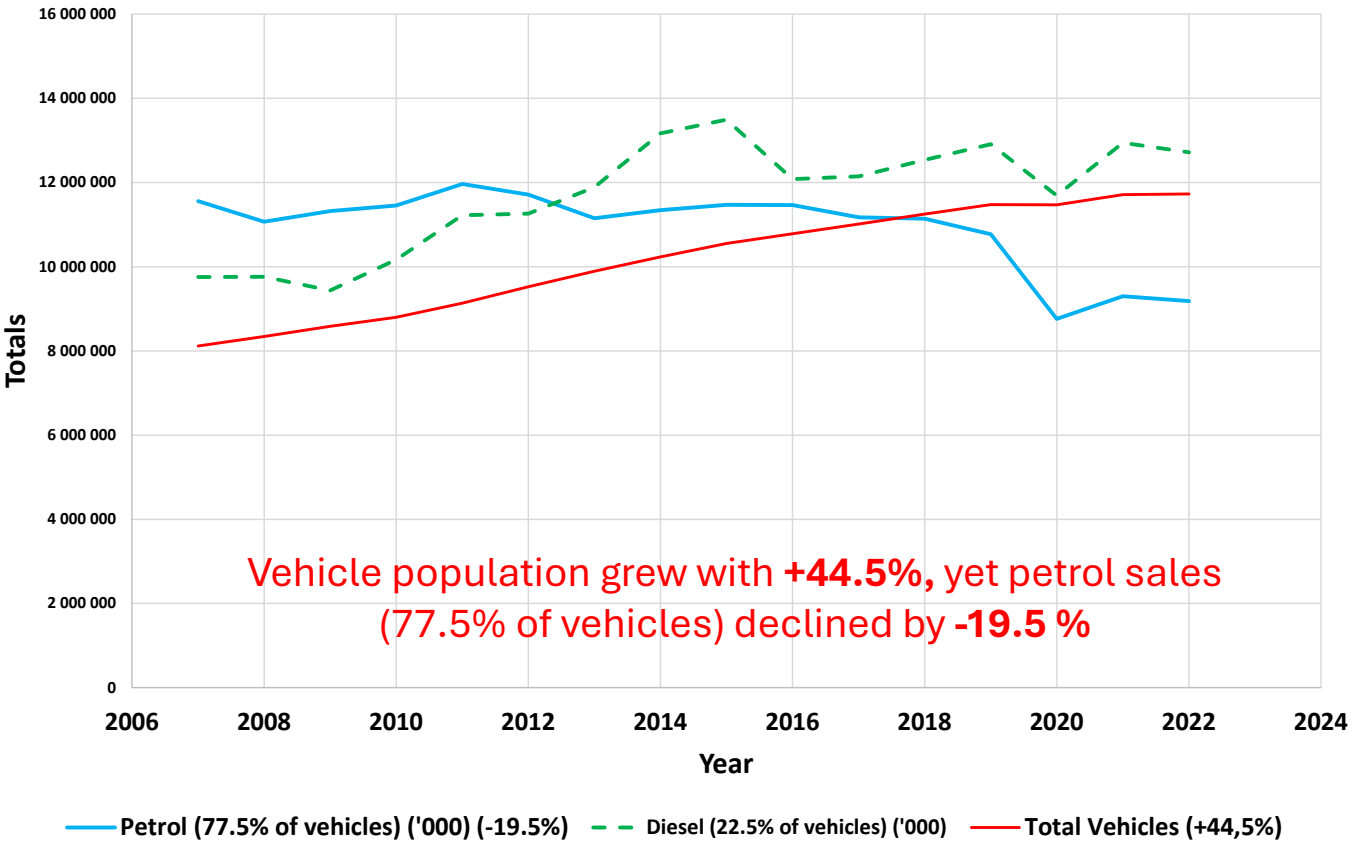
As noticed current budget kilometre levels are way below peak allocations during the 1970's and mid 1980's when most national road network construction occurred.

RSA ROAD FUNDING CHALLENGE AHEAD

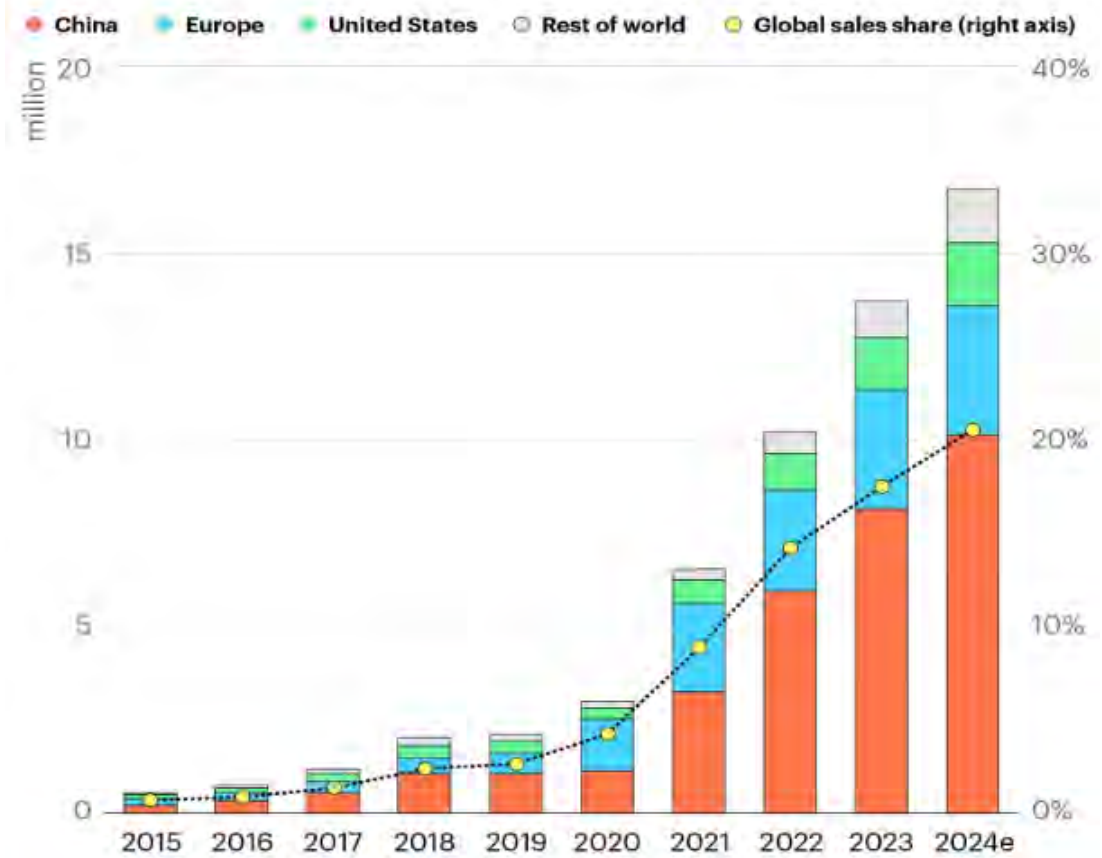


- Insufficient– **Less than 50% of requirement**
- Current sources of funding – Fuel Levy (R3.95/R3.81) / License or Tolls
 - Old (11 L/100km), New (6 L/100km), Hybrid (2 L/100km), Electric (0 L/100km) ?
 - Old (R43.5/100km), New (R23.7/100km), Hybrid (R7.9/100km), Electric (R0/100km)
 - Older vehicles (Poor) subsidising New vehicles (Rich) – Toyota Hiace (9.9 L/100 km)

South Africa Fuel Sales versus Vehicle Population Trend 2007 to 2022



Electric car sales by region and global sales share



Need to Find Long Term Road Funding Solution – GPS Road Usage Based ?

THANK YOU

